

DRAFT Minutes

MSC Content Management Meeting: March 10, 2015

Mazurek Justice Building, 4th Floor Attorney Lounge, Helena

Present: Ken Adams (MSC), Laura Tretter, Chair (State Law Library), Janice Kalvig (ImagineIF Libraries) Jemma Hazen (MSC), Jessie Goodwin (MSC), Amy Marchwick (MSC), Carrie Nelson (Flathead Valley Community College), Beth Boyson (Bozeman Public Library), Lyndy Bartlett (Missoula Public Library), Paulette Parpart (Missoula Public Library), Roberta Gebhardt (Montana Historical Society), Dave Shearer (Billings Public Library), Scott Nordtome (Lewis and Clark Elementary School, Missoula), Jodie Moore (Red Lodge Carnegie Library), Diane Anderson (Missoula County Public Schools) Allison Badger (Office of Public Instruction)

1. Introductions

- Roberta announced this would be her last meeting as she is now the Library Manager.

2. Minutes from previous meeting were reviewed and approved

- Janice asked about 029 junk tags – they are still showing up in her records. Jemma said she would look at ImagineIF's settings.
- Allison volunteered graciously to take notes.

3. MSC Reorganization Update (MSC Staff)

- Still working with individual libraries to correct item ID/user ID errors, clean up circulation rules, home locations and item categories. Cleanup has taken longer than expected because re-evaluating item categories has been more complicated.
- Want to start working with school libraries before summer vacation begins.
- With Enterprise's implementation, the relationship between facets and item categories is becoming clearer. It has become obvious that we need to reduce the number of item categories otherwise the facet list will be endless.

4. Enterprise Implementation (Ken)

- 31 libraries have implemented Enterprise.
- Currently, there is no way to allow libraries to customize their Enterprise pages because there is no way to limit a library's access to their individual page.
- Ken discussed various ways libraries could customize their search options and displays. MSC staff simplify displays so patrons do not see all the cataloging item types. Libraries need to fill out trouble tickets in order to have changes made.
- At some point, Amy would like to create form showing what libraries can and cannot customize in Enterprise.

5. AR/Reading levels

- The SirsiDynix deal has gone away.

- The Executive Board decided not to take action on this issue right now because of concerns that it would not be utilized by all member libraries, as well as the expense of implementation.

6. Strategic Plan Update (Roberta)

- Committee includes Roberta, Kim Crowley (ImagineIF Libraries), Sonja Woods (Miles City Public Library), Ken Adams (MSC), Sarah McHugh (MSC), Sinda Puryer (Flathead Valley Community College), MaryKay Bullard (Bicentennial Library of Colstrip), Kate Vassar Geise (Simms High School Library), Rhonda Horner (Noxon School K-12).
- Reworked and simplified plan created by the Executive Board. It now aligns more with the Montana State Library and focuses more on the membership itself. It does not include a vision statement because each library has a vision statement.
- Four areas of concern: Access, Training, Collaboration, Sustainable Success.
- Impact on the CMC: the CMC will need to establish standards for catalog records to ensure patrons can find resources (Access), serve as mentors and assist with MSC training as needed (Training).

7. NACO Funnel (Jemma)

- FYI -- Jemma has taken over Cara's duties as Montana's NACO Funnel Coordinator.
- Briefly explained NACO and the importance of name authorities.
- Jemma is looking into training options. People should contact her if they are interested in training. **SIDE NOTE:** Allison, Laura, Roberta and Paulette (among others) want training.

8. Vendor Records (Jemma)

- Reviewed the MSC's statement on overlaying vendor records.
- These records are not always of the greatest quality, have been adapted improperly, duplicates or have been enhanced poorly. Often they contain irrelevant information or lack 035 and 020 tags.
- Looking into the WorldCat Cataloging Partners program.
- Until Jemma started, between ten and fifty of these records appeared in the catalog on a monthly basis for two years – that we know of. She has since stopped them from coming in and has incorporated their cleanup into the reorganization.
- All MSC libraries, not just the schools, have bad records because of changing standards, as well as the lack of a MSC basic catalog record standard (Laura).
- Vendor records often reflect the simple interfaces that school libraries utilize (Diane).
- As more libraries enter into contracts with vendors for records, particularly for e-content, the staff-time related to loading these records, along with records standards are of increasing importance. Libraries that independently subscribe to OverDrive are paying for records that are currently available in the MSC. It is worth looking into way to prevent this duplication. Jemma will also bring these issues to the attention of the MontanLibrary2Go consortium at MLA.

9. ImagineIF pre-processing with Baker and Taylor – update and questions (Janice)

- Janice provided some background and explained the process.
- There is a slight lag time between when a brief bib record appears in Workflows and when Baker and Taylor "harvest" it. During that period, another library can enhance the record and add local notes. When Baker and Taylor re-adds the "harvested" record, it overlays the

previously enhanced one, resulting in the loss of local notes and unnecessary work for libraries.

- Various solutions were discussed but the overall consensus seemed to be that perhaps libraries such as Bozeman, Billings and Missoula should hold off processing new fiction for a few days. This would give Baker and Taylor a chance to “harvest” and then re-add the record.
- Examine bibload settings to see if it is possible to not overlay records that have been previously updated and enhanced based on the Data Cataloged setting. Jemma will work with Janice.

10. Cataloging Procedures Updates

DECISION:

- Committee decided to split sections needing revision among members rather than the vice-chair being responsible for all revisions.
- The vice-chair would coordinate this process.

Section 2: Add Statement about Early Distribution of Titles (Laura)

- Adding a sentence reminding people not to check out new titles prior to their official release date.
- Suggestions regarding processing protocols.
 - o Different home locations until books are ready to be checked out.
 - o Setting aside until official release date.
- Processing protocols need to be consistent with previous procedures.

DECISION: Carrie offered to draft a statement(s).

Sections 2 & 4: minimum bib record (Jemma)

- Currently there is no minimum bib standard. The Procedures do not detail what a bib record needs.
- A basic record needs to include 010, 020, 1xx and 245 fields.
- Minimum records used to be the way catalogers did things. There needs to be more training on creating fuller records (Paulette).
- If there is no record, your current options are to create one from scratch or edit a pre-existing one that may not fit exactly. However, the Procedures offer little guidance concerning these issues (Laura).
- Not all formats will have the same set of minimum standards.
- This impacts not just our local users, but patrons throughout Montana, as well as *any* user who trying to request items via ILL.
- Standards need to include minimum requirements for several different types of records: AACR2 [potentially], RDA, vendor-supplied records, copy-cataloging, self-published items, local items & equipment, brief & CIP records, and the 007 tag for non-print items.

DECISION: Paulette, Beth, Dave and Jemma volunteered to create minimum standards and procedures.

Clarify Serials vs. Series vs. Multipart Works (Jemma)

- Recurring issue. Previously, it was dealt with using call numbers but the bib records were not addressed. This situation has not been explained to member libraries.

- Some libraries, especially the schools, may have incomplete sets. Often, these “orphan” works end up on their own bib records. This is confusing for everyone!
- Again, no set procedure or definitions.
- Flow chart to guide people in their decision making (Laura).

DECISION: Jemma, Allison, Caroline Campbell, Laura, Lyndy and an undetermined person from a school library (Diane will find someone) to create basic definitions and guidelines.

Section 2.1: Rules for Attaching Copy, Review AV Rules (Laura)

- Rules need to be clearer.
- Should they be more like the rules for fiction?
- Discussed more fully during RDA discussion.

Appendix B: Cataloging Book Club Kits (Paulette)

- The failure to remove the 010, 035 and 020 tags is causing lots of issues.
- These are local records. They do not have OCLC numbers.
- People are attaching individual copies to these records, which causes issues with holds.
- This happens when people search by ISBN and these numbers have not been removed when a new book club record was derived from a book record.

DECISION: Add “Delete 010 tag to Appendix B.” This is more of a training and education issue. Contact those libraries who have erroneously attached records to a book club kit. Perhaps have Jessie, with help from Laura, create a video or some sort of presentation highlighting the differences between book club kit records and individual book records, that might help. Or perhaps more discussion in the Procedures.

Appendix C: Cataloging E-readers (Laura)

- Appears to be more of an issue with pre-loaded e-readers.
- Issues with call numbers and 505 fields.
- It’s not always clear if it’s just an e-reader or a pre-loaded one.
- Procedures need to be clarified. There need to be more steps listed.

DECISION: The Committee decided to focus the pre-loaded e-readers. Dave agreed to talk to various libraries regarding their issues.

Online Version

- The Committee would like the Procedures to be in a Wiki, with training videos.
- Haven’t investigated too many options.
- Ken suggested using Enterprise Portfolio. This is a content management system, similar to Drupal and Joomla, for assets. It would be indexed and searchable, as well as easy to migrate if necessary.
- MSC Administrators would manage the site and it would be inaccessible to the public.

DECISION: The Committee approves of Ken’s idea. It will take MSC staff time to learn the software. They will let us know when they are ready.

11. Patron Online Registration Form Review (Laura)

- Some discussion before the Committee realized it was not standard to all libraries and therefore not a topic of concern.

12. RDA Record Enhancement (Roberta)

- Consists of adding 33x fields, removal of the GMD and converting the 260 to a 264 in non-RDA records. This results in hybrid records – they are neither true AACR2 or RDA records.
- OCLC has been doing this to their AACR2 records and the MSC needs to decide how to deal with our records. Also, after March 31, 2016 OCLC will no longer use the GMD.
- Two ways this can be done: Automatic, which creates hybrid records or manual, which makes the records completely RDA. However, manual requires the individual and/or company making the changes to have the actual item in hand.
- Other issues include authority maintenance and indexing issues, requires lots of staff time (MSC and local libraries) and sometimes an AACR2 record is the only option. In other words, we will have to continually send off our records to be enhanced.
- This is something that cannot be put off. There is a lot to consider

DECISION: Inform the Executive Board that this is an issue and it needs to be addressed sooner rather than later. Additionally, the Strategic Plan needs to cover record enhancement because it will impact training, access and sustainable success. Roberta agreed to talk to the Strategic Plan Committee.

13. 007 Cleanup (Roberta)

- Roberta has found many MHS records that either lack the 007 field or it's inaccurate. She didn't discover this until MHS moved over to Enterprise and started having issues with the display icon.
- This field serves as the source of the format icon.
- Needs to be a priority.
- It may be possible to fix this issue using MARC Edit.

DECISION: Roberta offered to work with Mike and Jemma and be a test library for fixing this issue. Also, Jessie offered to create information/video about the 007 and its role. It was also decided that Jemma and Roberta would do a brief presentation (30 minutes or so) at the Spring Meeting that outlines 007 requirements and procedures, how this will be fixed and why it matters (impact on patrons). This is separate from the reorganization.

14. RDA Issues

- GMD: Continue to add to bib records (Jemma)
 - o 33x display in Workflows
 - o Are icons in Enterprise sufficient
 - o GMDS in e-books and other vendor supplied records
- Review rules for attaching copy (Jemma)
- **Discussion (all topics)**
 - o Jemma provided a brief overview of RDA's significance and role in improving the user experience.
 - o It will influence our choices of what to add to bib records and how records will appear to patrons.
 - o GMDs
 - Part of the same discussion regarding what is a basic record. What are our standards? Until we figure this out, it's hard to move forward.
 - At this moment, we still need either the GMD or 33x fields (Paulette).
 - Add the 338 (Carrier) and use in conjunction with the GMD.
 - What to do with large print books. The 33x fields are of no help at this point in time. For patrons, we can limit these items by Item Cat 1.
 - For book club kits, we could add a 007 that displays a different icon in Enterprise. Since these are local records (no OCLC number), we may be

able to leave the GMD in the record. However, this will depend on the standards that are set for these items.

- How will this appear in Workflows and Enterprise?

DECISION: Follow Roberta's suggestion and the CMC rep that attends the next Executive Board recommends that they set an end date for E-Library.

- DVDs

- Should we put all editions of Star Wars on one record, regardless of the edition (Widescreen or Director's Cut) or special features? We do this with fiction, so it wouldn't be too much of a leap.
- How does this fit with RDA?

DECISION: Amy will investigate adding a column in Workflows that displays the 338 field to help library staff differentiate between formats. For the time being, we are asking members not to remove GMDs from records. If MSC staff decides that it is relatively easy to add the 338 to the display, members will be asked to not add GMDs to records they bring in via SmartPort. In other words, our policy for including the GMD will be open for discussion for the foreseeable future.

Also, leave the AV rules as they are. They are stricter than the fiction rules. Additionally, there are patrons who do want a specific edition with certain features.

15. Training

- Instructions for improving sub-standard records (Laura)
 - Instructions for overlaying order, CIP, and other sub-standard records.
 - Instructions for editing substandard records vs record enhancement.
 - Communicating with member libraries when sub-standard records are discovered.
- **Discussion (all topics)**
 - Problems: libraries are afraid to download new records, rely on close enough records and/or download unnecessary records.
 - Comes back to a lack of standards for bib records. Before we can go further, we need to decide on standards for improving records, as well as a standard for basic records.
 - People don't know they can edit bib records in Workflows and/or OCLC.
 - Overlay procedures are unclear.

DECISION: More training! Jessie and Jemma plan to create curriculum (videos and paper documents) of varying lengths and skill levels that demonstrate how to download new records via SmartPort, edit and/or enhance records and how to overlay records. Their goal is to set it up so librarians only need to view what they need to do their jobs. There was also a suggestion to create cheat sheets similar to the one created by Laura for RDA.

16. MSC Authority Updates (Jemma)

- Consist of quarterly updates from Sirsi. They list headings that have been changed, deleted or cancelled.
- This is a list of changes that need to be made.
- Sirsi adds the new headings, but has not been deleting headings.
- Jemma wants Sirsi to delete as well as add headings.

- Paulette wants just the dates and names, no relators. Jemma said she would look into it.

DECISION: Jemma or Ken will tell Bill Elliot at Sirsi Dynix to change our current contract to delete those cancelled and deleted authorities during the quarterly update. Re-indexing will continue at 10,000 records per night until all the headings are re-indexed to prevent catalog down-time. There is no additional cost to members to make this change.

17. Executive Board Meeting CMC Rep discussion (Laura)

- Laura reviewed her involvement – mainly her talking about the work of the CMC.
- She's unsure if the Chair should continue attending the Executive Board meetings, but feels that we need to continue updating the membership at the Fall and Spring meetings.
- CMC is not a standing agenda item for the Executive Board, so it's unclear if there is a benefit to attending.
- Possible solution is to rotate among CMC members because we feel it is important to remind the Executive Board of our role and the importance of cataloging.

DECISION: The Chair is still responsible for attending the Executive Board meetings or for arranging for an alternate CMC rep to attend. People see the value in rotating this duty, so the Chair should feel free to ask other CMC members to attend.

18. Election of Vice-Chair

-Jodie agreed to be the vice-chair!

19. Tip of the Month Assignments

- People respond better when they are more general in nature, rather than technical.
- Start with RDA tips and move into tips for Enterprise.

Assignments:

April 2015: Roberta – RDA vs. hybrid records

May 2015: Beth – How to search for books

June 2015: Dave – How to search for DVDs and other AV materials

July 2015: Laura – Where to find help

August 2015: Carrie – The disappearing GMD

September 2015: Scott – Adding reading levels to records

October 2015: Janice – How to handle early releases

November 2015: Jodie – The importance of communicating your close dates to MSC staff

December 2015: Carly – Cataloging mentors, who they are and how to use them

January 2016: Marilyn – Tips of the month review

February 2016: Robert – Enterprise. According to Paulette, he will come up with something.

March 2016: Lyndy – How to submit trouble tickets

Meeting Adjourned.